



## COASTAL AND MARINE TOURISM

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## Tourism Sector in Kenya

Sector is a crucial driver of economic growth and development, accounting for **8.2 % of GDP**

Directly contributes to a total employment of about **1.1 million people**, and creates **forward and backward linkages** with other sectors of the economy thus adding its contribution to about **1.6 million jobs (or 8.5% of total employment)**



## Tourism Sector in Kenya

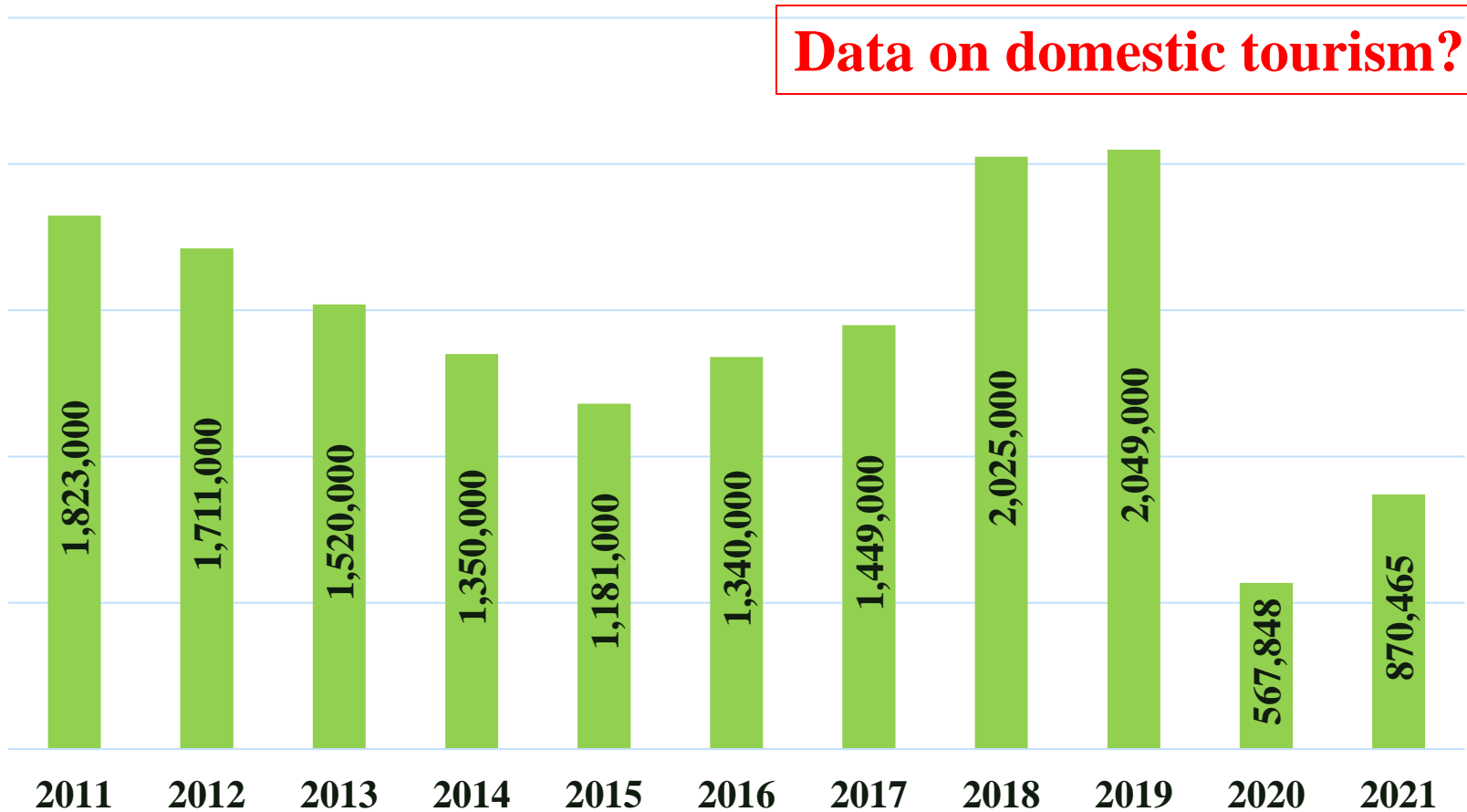
Before the Covid-19 WTTC had predicted the number of international tourists in Kenya to reach **2.3 million by 2027**

Kenya's focus has been on **international tourism** due to **foreign exchange**. There is however an increasing recognition of the role that **domestic tourism** plays to the economy and its **stability** for it is not as sensitive to **international interruptions of terrorism, global financial crisis, and politics**.



## Tourism Sector in Kenya

International Tourist Arrivals





## **Tourism Sector in Kenya**

**Tourism was identified as key sector under the economic pillar of the MTP III (2018-2022). The main target for the Tourism Sector in the Plan was to increase tourist arrivals from 1.3 million in 2016 to 2.5 million by 2022.**

**Planned projects for implementation in coastal and marine tourism were: coastal beach tourism, cultural and heritage tourism, the Lamu resort city, tourism infrastructure and enabling services.**



## Tourism Sector in Kenya

The country's tourism offers products in its three major product lines of **safari, coastal, and business & conference travel.**

**1. Safari tourism is dependent on natural and wildlife assets, which are typically remote and difficult to access, and is highly seasonal. It is limited in capacity given the fragility of ecosystems and the sensitivities of the animal population**



## Tourism Sector in Kenya

**2. In business travel, independent business travelers originate from domestic, intraregional, and international source markets and choose specific Kenyan destinations depending upon their business activities.**

**In contrast, conference and meeting attendees are drawn to major meetings. Africa has a relatively small share of the growing global convention and conference demand, Kenya has East Africa's largest convention facility**



## Tourism Sector in Kenya

3. The country's **coastal tourism** offering ranges from the to sleepy and culturally rich destinations, such as Lamu Island, appreciated by more independent tourists.

Coastal tourism offers the allure of a **relaxed beach experience** with the potential for day trips to nearby **animal parks and cultural sites**. Its mostly **mass-packaged tourism** of Mombasa's large coastal resorts





# **Coastal and Marine Tourism and Economic Development**



## Coastal and Marine Tourism Kenya

Coastal tourism offers **land-based tourism activities** taking place on the coast, including their respective services, for which the **proximity to the sea is a condition.**

Marine tourism refers to **sea-based activities** such as boating, yachting, cruising, nautical sports, as well as their **land-based services and infrastructures.** It covers a wide range of activities in the deep oceans.



## Coastal and Marine Tourism Kenya

Coastal and marine tourism account for **93%** of ocean economy's **4%** contribution to GDP with most of the other subsectors contribution being way **less than 1%**. It is regarded as one of the **fastest-growing areas** of contemporary tourism and could contribute more.

It has been spatially focused on the beach---**three 'S' of tourism sun, sand, and surf**, but ocean and the marine environment as a whole has become one of the **new frontiers** and **fastest-growing areas** of the world's tourism sector



## Coastal and Marine Tourism Kenya

Tourists converging at the country's coastal and marine sites have different tastes and preferences with diversity in **origins, culture, lifestyles, values, and needs**. These drive tourism market segmentation.

Coastal and marine tourism in Kenya is dominated by **mass tourism** involving the **movement of large numbers of international tourists** to often **all-inclusive enclave beach resorts**. This excludes local entrepreneurs are from the tourism value chain's benefits.



## Potential for Coastal and Marine Tourism Development

**1. Cruising ship tourism:** Attracts high net worth tourists--**400 cruise tourists** are equivalent to **4000 air travel tourists**.  
development of cruise ship tourism infrastructure is vital

- Cruise ship **terminal equipped for 2000** cruise ship passengers at a time is completed (but under utilized)
- Port of Mombasa to Moi international airport makes it ideal for **cruise-fly services**
- **Hotels and beaches** of international standard
- **Port tourism** can be developed to offer trips from Msa to e.g. Zanzibar, Pemba etc.
- **Cruise safaris** possible due to proximity to **game parks and reserves**



## Potential for Coastal and Marine Tourism Development

**2. Water sports tourism:** Extensive beaches and coastal lines protected by the continental shelf, making it relatively safe for water sports tourism

- Skydiving, snorkeling, wind surfing etc. exist but potential has **not been fully exploited** due to a lack of **equipment and skilled personnel**
- If improved, could attract, **hugely youthful regional and domestic population** and **avoid seasonal effects of tourism**



## Potential for Coastal and Marine Tourism Development

### 3. Cultural/Heritage tourism:

- **Swahili culture and the monuments** at Fort Jesus and ruins of ancient settlements exhibit a rich cultural heritage
  - **Endemic coastal forests** such as the **Arabuko Sokoke** and Shimba Hills Reserve
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- **Kayas** are forested areas of spiritual and cultural significance to the Mijikenda people
  - More than half of **Kenya's rare plants** are found in the coastal region, many in the Kayas



## Potential for Coastal and Marine Tourism Development

### 4. Thematic Itineraries

- The Kenyan Coast is among the oldest trade ports where early explorers, missionaries, merchants, and sailors docked for supplies
- Both domestic and international tourists can target these.

**5. Health and Spa:** Health and spa facilities are expanding along coasts, including alleged medicinal and therapeutic qualities of the sands and clays and thermal waters.





## Potential for Coastal and Marine Tourism Development

### 6. Complimentary activities

- Activities such as wine-tasting, gastronomy (food and culture), conferencing, special events, festivals, health, and well-being.
- Enriching and diversifying the tourism product can reduce seasonality in many coastal and marine destinations.

**7. Underwater and seafloor/floating resorts:** There are no underwater hotels or sea flow resorts on the Kenyan coast. These could be exploited to increase targeting both international and domestic high net worth clients. Kenya can learn from other countries



## Potential for Coastal and Marine Tourism Development

### **8. Deep-sea tourist expeditions**

- Include shipwrecks to hydrothermal vents and other beautiful deep-ocean ecosystems. Marine national parks with exciting sea flora and fauna. Kenyan could take advantage of the rich ocean resources and design and starting offering it to attract more tourists.

**9. Recreational boating and Yacht Tourism:** high-value, low-impact tourism to coastal regions, stimulating the local hospitality, transport, construction, and supporting trades. This could be ideal for Lamu and other smaller islands.



## Potential for Coastal and Marine Tourism Development

### 10. Sustainable exploitation of natural resources and attractions

- Include Marine Parks, underwater archaeological parks, coral reefs, and other locations with archaeological, ecological, or historical value can be exploited sustainably. can be an attraction to academia, researchers, and explorers etc.

**11. Hotel Tourism:** many prime plots of land for hotels on the coastline are dormant. impose heavy taxes on such dormant land or pass a bill in parliament to ensure that such prime land is being utilized.



## **Potential for Coastal and Marine Tourism Development**

### **12. Deep-sea Sport fishing, sea safari, and mountain trips**

**Need build capacities of local fishers through training to fish in the deep seas. Investing in right boats for deep sea fishing is imperative as many fishers use canoes currently. Equipment +training will create demand for sports**

**Need for partnerships between communities, public institutions like KWS and private investors**



## Barriers to Coastal and Marine Tourism

**1. Difficulties attracting or maintaining enough skilled personnel to work in its various sectors due to both seasonality and lack of career opportunities**

**2. Low Level of Innovation:** current outdated products are unable to compete with new destinations offering stylish tourism experiences at an appropriate price or value



## Barriers to Coastal and Marine Tourism

**3. Regulation of the tourism sector is highly fragmented.** There are many different legislative instruments regulating tourism further complicated by the overlapping functions of many public organizations regulating the sector

**4. Lack of Information/data:** Reporting of marine and coastal statistics is not easy, and neither is it a standardized task. There is substantial uncertainty concerning the data needed for public policy formulation and private sector decision-making in the sector.



## Barriers to Coastal and Marine Tourism

**5. Climate Change:** Rising sea levels associated with climate change will cause coastal erosion, loss of beach area, higher costs to protect and maintain waterfront tourism precincts.

**6. Financial Constraints:** Limited or no access to credit to support investments and innovation. Banks often lack the particular knowledge required to assess business plans and make risk assessments in various tourism market segments.



## Barriers to Coastal and Marine Tourism

**7. Leakages and offshoring:** High leakages of tourist expenditure occur through the high import content of tourists' consumption bundle as a result of a narrow production base in many coastal and marine destinations

**8. Pollution:** Environmental decline in the coastal and marine resources e.g. hotels using plastic bottles, oil spills and air pollution from cruise ships.





## Barriers to Coastal and Marine Tourism

**9. Safety and Security:** Terrorism, post-election violence, political instability in the region, and crime which led to increasing cross-border traffic in small arms. Strengthening of the Tourist Police Unit (TPU).

**10. Weak Marketing:** international promotional campaigns and marketing representatives would attract more tourists and improve their perception of the tourist destination.

**11. Global communicable diseases:** Covid-19 is one of the greatest challenges facing the world today.



## Barriers to Coastal and Marine Tourism

**12. Language barrier:** The shortage of tourist guides who speak a foreign language

**13. Bureaucracy:** So many licenses and documentation are required for investment

**14. Water and sanitation:** Safe drinking water and sanitation especially in the coast are to be addressed in coastal and marine tourism is to thrive.

**15. Poor hospitality and other related services:** Unavailability of accommodation facilities and few luxury hotels (less than 20% being 4-5 star) distort tourist expectations.



## **A note on Tourism in the Inland Blue Economy**

Majorly consists of **rivers** and **lakes**.

- **Less attention paid to inland blue economy opportunities (rivers and lakes), especially for the tourism sector and thus remains untapped**
- **There are Diverse inland resources located in diverse parts of Kenya and offer a range of tourist attractions.**
- **Need to map out, quantify the value and promote inland BE tourism.**



# **Governance Frameworks and Gaps**



## Governance Frameworks and Gaps

Regulation of the sector draws from **multiple laws** and support from other sectors for a full circle tourism economy.

The main legislation governing the tourism sector in Kenya is the **Tourism Act 2011**. The Act provides for the **development, management, marketing and regulation** of sustainable tourism and tourism related activities

**Tourism Regulatory Authority:** in charge of formulating and prescribing measures to ensure realization of sustainable tourism development



## **Governance Frameworks and Gaps**

**The governance framework can be viewed from:**

- **Principle National and regional regulation**
- **Regulation on tourism sites**
- **Regulation on tourism services**
- **County level regulation**



## **Governance Frameworks and Gaps**

**The governance framework can be viewed from:**

### **1. Principle National and regional regulation**

- **Tourism Act 2011**
  - **Tourism Regulatory Authority**
  - **Tourism Fund**
- **National Tourism Policy**
- **Kenya Vision 2030**
- **EAC Treaty**



## **Governance Frameworks and Gaps**

**The governance framework can be categorized into:**

### **2. Regulation tourism sites**

- **National Museums and Heritage Act**
- **Wildlife Conservation Act**
- **EMCA**
- **Forest Conservation and Management Act**
- **Fisheries Conservation and Development Act**





## **Governance Frameworks and Gaps**

**The governance framework can be categorized into:**

### **3. Regulation on service and industry**

- **Hotel and Restaurants Act**
- **Food, Drugs and Chemical Substances Act**
- **Film and stage plays Act**

- **4. County Tourism Legislation (including county specific regulation law)**



# Governance Frameworks and Gaps

## NATIONAL LEVEL

### Regulation of the Sites

- National Museums & Heritage Act
- Wildlife Conservation Act
- EMCA
- Forest Conservation & Management Act
- Fisheries Management & Development Act

### - TOURISM ACT, 2011

- Tourism Regulatory Authority
- Tourism Fund
- EAC Treaty
- National Tourism Policy
- Kenya Vision 2030

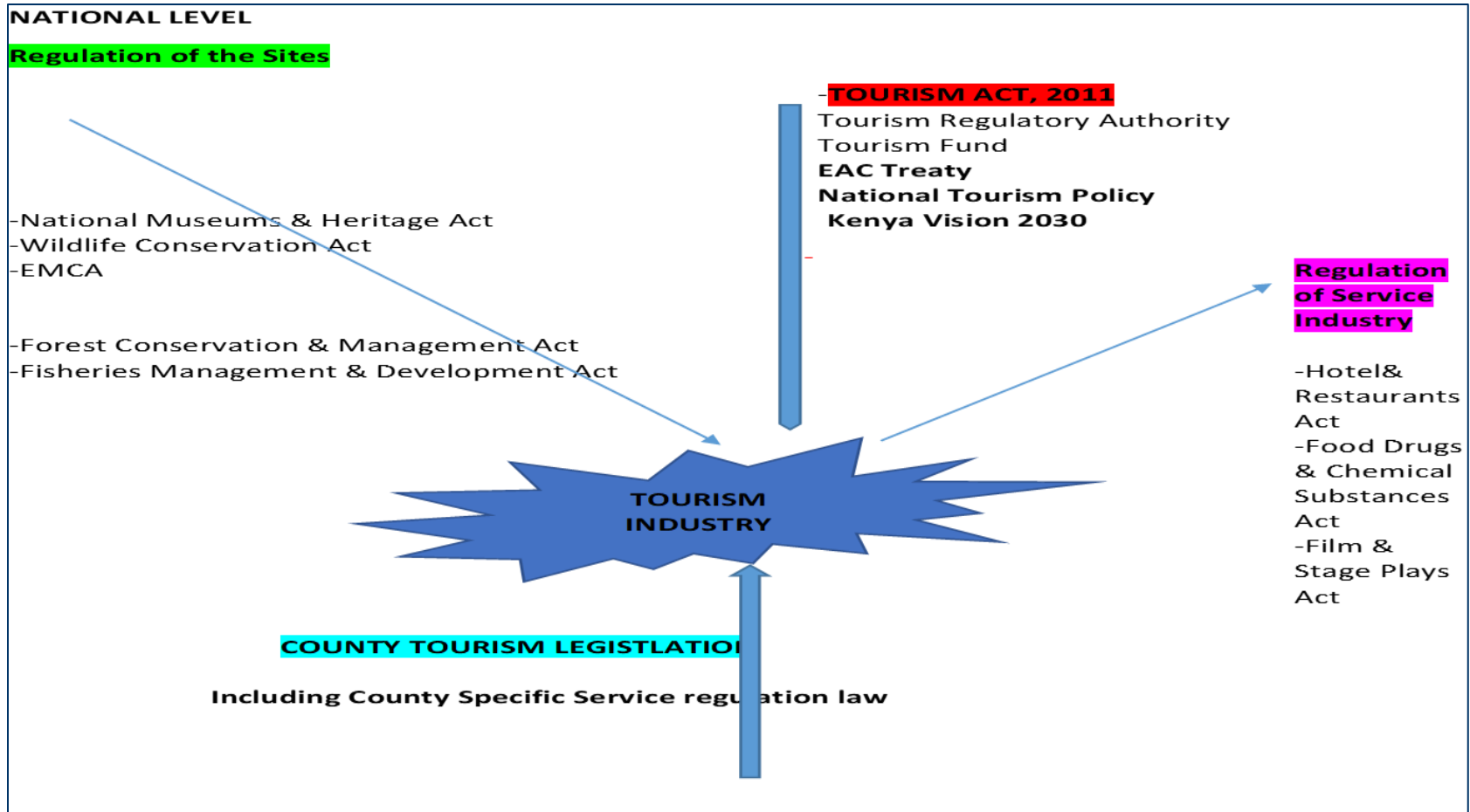
### Regulation of Service Industry

- Hotel & Restaurants Act
- Food Drugs & Chemical Substances Act
- Film & Stage Plays Act

**TOURISM INDUSTRY**

### COUNTY TOURISM LEGISLATION

Including County Specific Service regulation law





## **Governance Frameworks and Gaps**

**In general governance framework is**

- **Highly fragmented**
- **Many legislative instruments**
- **Overlapping functions**



# Recommendations



## Recommendations

- Improve cruise tourism by creating interlinkages with **cruise-fly services, port tourism, cruise safaris etc.**. This requires interlinkages of several players e.g. KAA, KPA, KWS, hotels and beaches etc.
- County and national governments can market Kenya coast through **annual water sports events** akin to EA Safari Rally
- To improve heritage/culture tourism, **counties** could work with **local communities** and organize events that allow they local people to show case their cultures



## Recommendations

- **Harnessing/ Collaboration with other BE Sectors** e.g forestry, transport and ports, agriculture, fisheries, agriculture etc.
- **Promotion of inland blue economy tourism**, including mapping and quantifying the value of inland tourism sites and attractions.
- **Strengthening the existing support instruments including integrated approach in the mapping and management of land and sea based resources.**



## Recommendations

- Implementing an **Open Sky policy** will encourage many airlines to land **in Mombasa** without having to transit through Nairobi.
- Market Kenya as an **ideal destination for thematic itineraries** such as old trade port for missionaries, traders etc. This could be done locally and internationally
- **KNBS, research institutions and other stakeholders** to work with the sector to **determine the necessary data** needed to inform policy in the sector and help collect it.



## Recommendations

- **Upgrading existing health and spa, and other outdated products to meet international standards so we could compete with other top tourism destinations**
- **National and county governments to work on modalities of reducing licensing and documentation to investments in the sector**
- **All Hotels to adopt use of glass bottles for water and discard used of PETs. They should be encouraged to have CSR and CER targeting environment conservation**





## Recommendations

- JKP County governments with sea fronts to explore **sea water desalination** to improve provision of water in the hotels.



**End**